



# The Importance of Strategic Planning for Your Library

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# STRATEGIC PLANNING

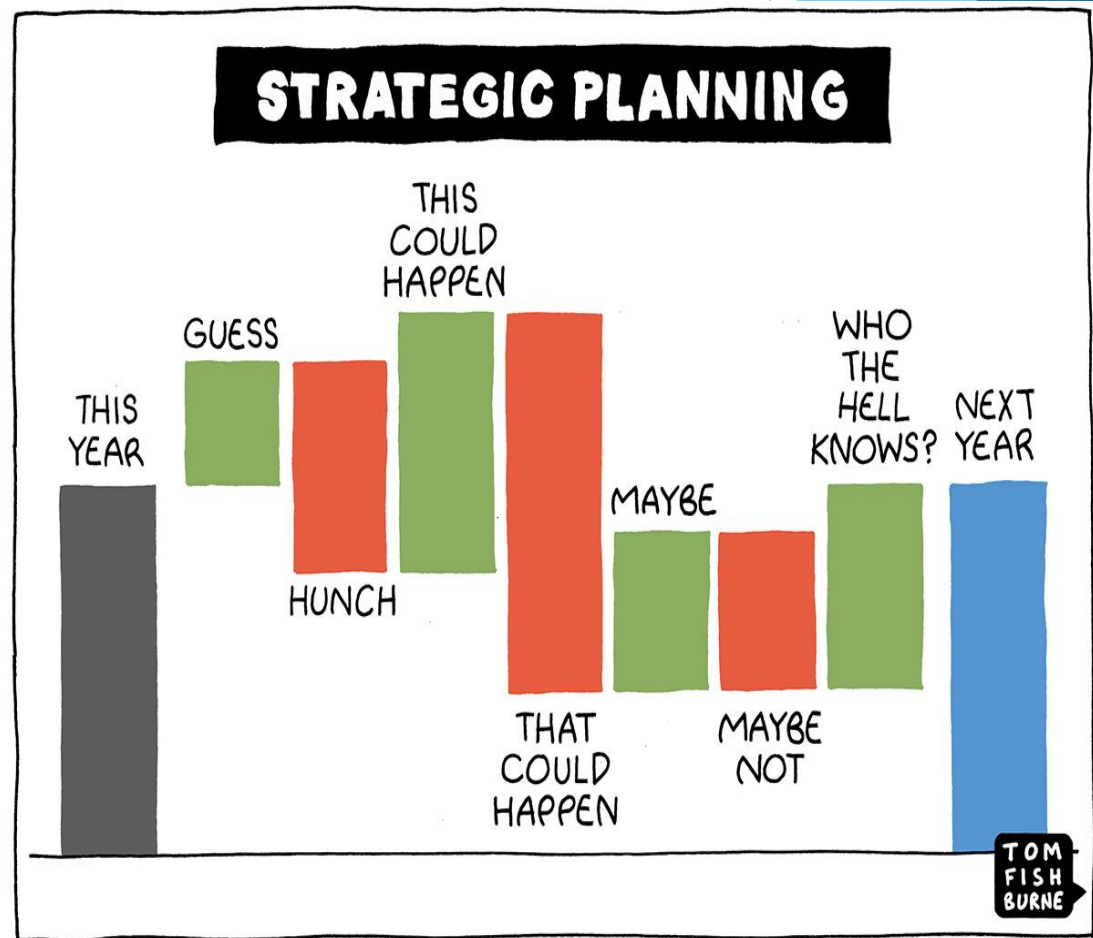
It's not  
*THAT* scary

# Planning Fears are Real

What are the challenges to planning?

Have you had negative experiences?

What has prevented your library from planning?





**It doesn't need to:**

- Take a lot of time**
- Cost a lot**
- Make you crazy**
- Produce few or no results**

**Planning is About  
Answers to Questions**







# What is Strategic Planning?

- ▶ A process
- ▶ A direction or future path
- ▶ A guide tool
- ▶ A measure of success

# What Makes a Plan STRATEGIC?



BIG picture, directional  
issues - even visionary



Comprehensive - but  
NOT detailed



Board, management,  
leadership focus





# What Results Should You Expect?

- ▶ A written document with clear goals
- ▶ Buy-in from constituents
- ▶ Clear strategies to implement
- ▶ Ways to measure your success
- ▶ Helping build a culture of planning

**Why plan?  
Is it time  
for you to  
plan?**

# When is it time to plan?

*(Other than always)*



Facing changes in your library, library service, your community, or the world



Needing to be more effective, grow, or increase resources



Getting everyone in the library on the same page



Providing long-term direction to staff/community



# Why is a Strategic Plan Important for a Public Library?

- ▶ Libraries, communities and the world are changing. Helps you navigate with purpose.
- ▶ Connects the Library to its constituents (not just current users)
- ▶ Sets a stated direction for whole organization



## Why is a Strategic Plan Important for a Public Library?

- ▶ Builds support from staff, patrons, funders, etc.
- ▶ Increases likelihood of targeted impact
- ▶ Allows for effective measurement of services. Are you doing the right things?





**The Planning  
Process  
is as  
**IMPORTANT**  
as the  
**Final Plan!****

# Keys to a Plan's Success

- ▶ People-focused
- ▶ Quick and engaging
- ▶ Action-oriented, moves to implementation
- ▶ Progress check-ins and accountability







OOPS!

# Missteps to Avoid

- ▶ Trying to do too much
- ▶ Vision/mission are unclear
- ▶ Goals aren't attainable
- ▶ No accountability
- ▶ Not supported by staff/users



It is vital to create and foster  
a culture of planning.  
**People drive plans,**  
not documents.

# Build a Culture of Planning

Regular Board  
check-in and  
review  
(dashboard and  
annual review)

Committed and on-going  
Library staff leadership for  
planning

Staff work or  
implementation  
plan, updated  
at least  
annually

Accountability -  
champions who  
are held to  
accomplishing  
tasks on time

Planning to plan again.  
Iterative, never-ending  
process.

# What does a “culture of planning” look like?

- ▶ Embraced by leadership - board and director
- ▶ Formalized process
- ▶ Drives operations
- ▶ Is a regular, ongoing part of meetings
- ▶ Determines results you are striving to achieve
- ▶ Has accountability across organization
- ▶ Success is measured by the planning goals and stated outcomes



**Concerns?  
Questions?**

**A good planning  
process looks at  
internal issues**

**Budget**

**Staffing**

**Collections**

**Technology**

**Facilities**

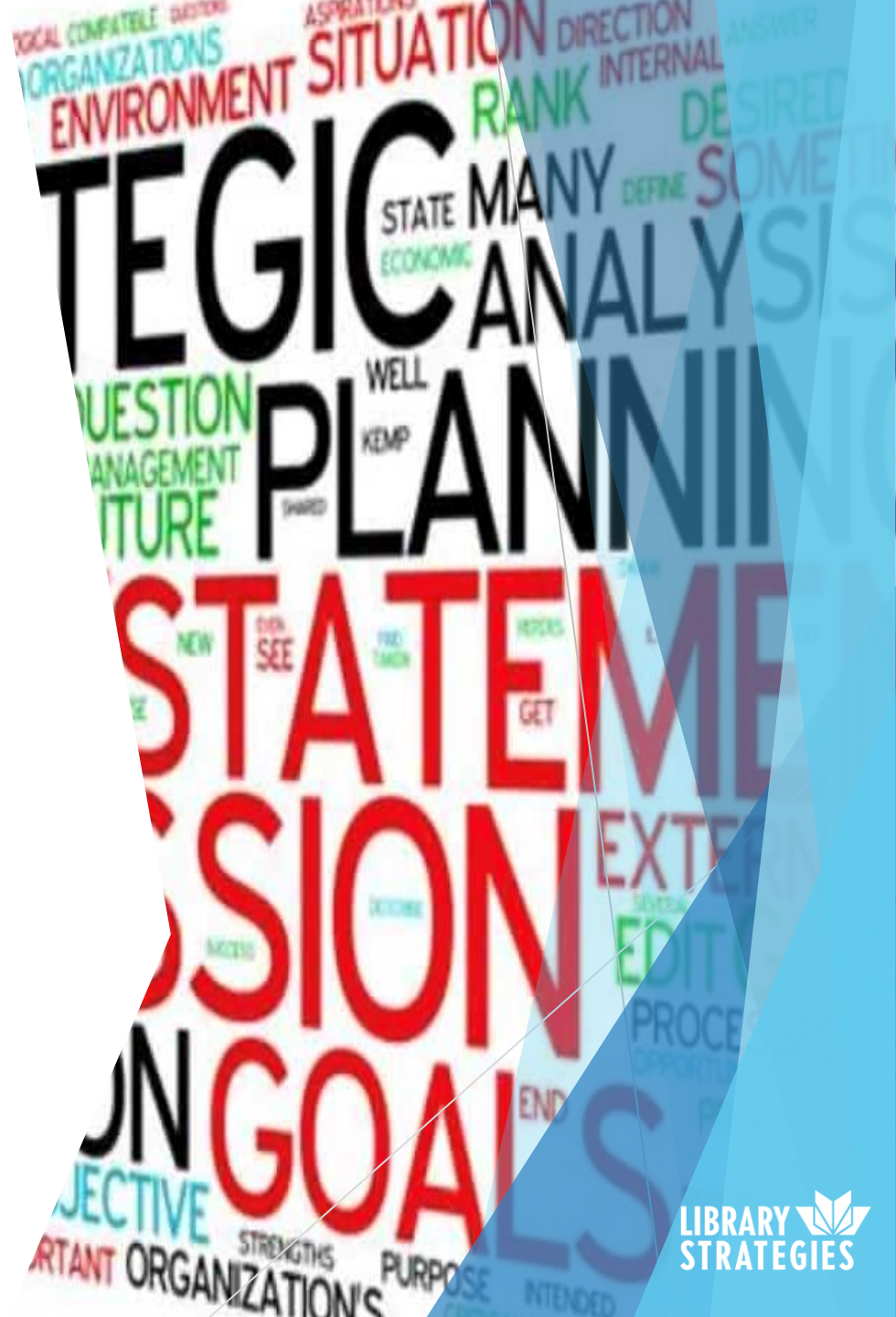








**Good  
planning  
values the  
outsider's  
perspective**



Libraries can't serve everyone equally, but they can approach equitable service.

Free, open access isn't necessarily equitable.

**You are making a choice.**  
How do you decide who and what to prioritize?





## Important to look at the diversity of your community. What does diversity look like for you?

- ▶ Race and ethnicity
- ▶ Age – 0 to 100+
- ▶ Differing economic classes
- ▶ Different educational levels
- ▶ Gender: Men, women, LGBTQ
- ▶ Language
- ▶ Physical or learning challenges
- ▶ Religion
- ▶ More....

Who does  
your library  
serve well?  
Who can  
you serve  
more fully?

# Cookin' Up a Plan: Typical Steps

## 1. Review data at hand

- ▶ *Examples:* Usage stats, budgets, census data

## 2. Conduct research

- ▶ *Examples:* Benchmark to peers, industry trends, new service evaluations





## Cookin' Up a Plan - 2

### 3. Internal Stakeholder Input

- ▶ *Examples:* Staff survey, staff/Board retreat, Friends/foundation

### 4. External/Market Input

- ▶ *Examples:* Surveys, retreats, focus groups, listening sessions and community forums





## **Cookin' Up a Plan - 3**

### **5. Drafting/Approving the Plan**

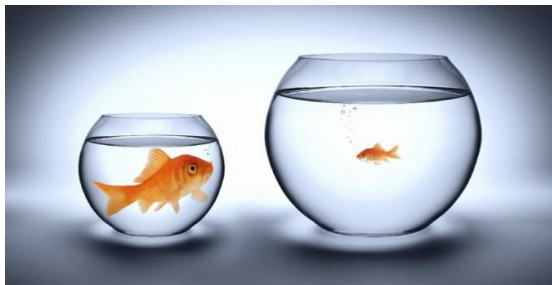
### **6. Work Plan and Implementation**

- ▶ Who does what and when to achieve the goals?

### **7. Evaluation**

- ▶ Regular plan check-ins to mark progress and outcomes





# Right-Size Your Process

- ▶ Your planning committee may be 3 or 15 depending on your size
- ▶ You may have enough data on hand, or you may need to spend time compiling it
- ▶ Research may be needed, or you can find it on-line, or from your state or regional library
- ▶ One staff/board session may suffice for internal input, or you might need multiple processes
- ▶ One forum for community input may be enough or you might need many, different processes in a larger setting
- ▶ The Director may be able to draft the plan, or you might need more people to be involved

# Elements of a Strategic Plan



**MISSION** - A statement describing the reason your organization exists. What you do + what/who you do this for.

**VISION** - A statement describing aspirational yet achievable long-term changes to be brought about by your organization's work

*Both should be concise, in simple language, and used regularly.*

# Elements of a Strategic Plan (Sometimes)



## **VALUES STATEMENT -**

It expresses an organization's motivations and the worldview under which it operates. It helps define the operational culture for staff, board, and community.

# Elements of a Strategic Plan



## GOALS -

What you want to accomplish. Changes in course or new directions to undertake. Focuses on overcoming challenges or taking an alternative path.

## STRATEGIES -

Major methods to achieve your goals.

*(These are sometimes done in a SMART framework - specific, measurable, achievable, relevant, time-bound)*

# Elements of a Strategic WORK Plan



**TACTICS/TASKS**

**CHAMPION (WHO'S  
RESPONSIBLE)**

**TIMELINE/DEADLINE**

**RESOURCES NEEDED**

**OUTCOME, MEASUREMENT,  
OR OUTPUT**

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# Thoughts on Planning Process or Elements?

# In Your Handouts

- Presentation PowerPoint
- Possible Planning Processes for Different Sized Libraries
- Simple Planning Framework/Template
- Sample Community & Staff Surveys
- Sample Mission/Vision/Values Statements
- Suggested Community Retreat Participants
- National Trends one-pager
- Links to Sample Library Strategic Plans





# Final Questions?

# Thank You!

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and the Montana kids,  
Olivia, J.J. and Roman,  
and the kids of the  
Saint Paul Public Library

